Portal Guide – For Sponsors

https://portal.sfcta.org

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For questions or suggestions, e-mail eric.reeves@sfcta.org

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General Information

Logging in

- Use your full e-mail address to sign in.
- Click "**Reset Password?**" in order to set your password for the first time or reset it if you've forgotten it. You'll get an e-mail with instructions.
- Using the "**Remember Me**" check box may prompt your browser to ask permission to save the password. Say yes to make sure this works.
- Once logged in, click on "**Profile**" at the top to change your password or contact info.

Standard Grant Agreements—'SGAs'—and Projects

- Most records in the database are SGAs, and each SGA is treated as a standalone project by default.
- However, if an SGA is one component of a larger project, it will be assigned to a "Project". The Project link is shown just below the SGA title.
- Projects will have Record Type = Project. Standalone SGAs and SGAs that are grouped under a parent ("children") will have Record Type = Grant.
- Projects may be divided into SGAs by funding source, project phase, or scope elements.
- See the last page of this guide for an explanation of SGA numbers.

User Classes, Assigned Roles, and Subscriptions

- There are four **classes** of users in the Portal, controlled by settings on the account page.
  - Sponsor Agency users – This is the default user class. Users can see all grants from their agency.
  - Grant Manager users – Sponsor agency grant managers can add other users as subscribers to a grant.
  - SFCTA users – Transportation Authority Staff members can view all SGAs and to make updates to the contact info for other users.
  - Deputy – SFCTA Deputies in the Policy and Programming, Capital Projects, Planning, Technology, Data, and Analysis divisions.
  - Executive – SFCTA Executive Director, Chief Deputy Director, Finance and Administration Deputy, and Communications Officer.
  - Portal administrators – Certain overrides and correction of errors on locked forms must be performed by Portal administrators.
- Within the Portal, users may be assigned to **roles** on a particular SGA. Once assigned, the SGA appears on the user's dashboard, with alerts. All SGA e-mails are copied to assigned staff.
  - Project Manager – This is the person responsible for the scope of the grant and is assigned in the grant agreement. Any user may be assigned this role.
  - Grants Section Contact – This is the person responsible for working with SFCTA to administer the grant and is assigned in the grant agreement. Only Grant Manager-class users may be assigned this role.
  - TA Contact – This is the primary SFCTA point of contact for the grant. Only SFCTA-class users may be assigned this role.

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- o TA Backup Contact – In some cases, a backup SFCTA staff member may be assigned. Only SFCTA-class users may be assigned this role.
- Users may also become **subscribers** to a particular SGA. Once subscribed, the SGA appears on the user's dashboard, but without alerts. All SGA e-mails are copied to subscribed staff.
  - o Grant Manager users may subscribe other staff in their agency to an SGA.
  - o SFCTA users may subscribe other staff from any agency to an SGA, which will grant permission for a user to see the SGA even if it is outside their home agency.

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Use of Electronic Signatures

- E-Signatures allow electronic recording of approvals on a form.
  - E-Signatures are currently available for Sponsor submission of Requests, and within the "For SFCTA Use Only" box of Requests.
  - Click the "Initial" or "Sign" button, enter your password and initials or full name, and click "OK" to generate an initial or signature and date on the line selected.
  - E-Signatures record the date, time, user-written text, logged-in user ID on the form, as well as the user IP address in the database.
  - If you choose to sign for someone else, write "for [name of person]" or "See attached scan" in place of the signature. **Do not use someone else's log-in.**
- E-Signatures can only be reset by a Portal administrator.
  - E-signatures should be considered similar to signing paper; **you cannot "unsign."** Completing a section of signatures automatically updates the status of a request.
  - In the event of an error, you must contact an administrator to clear a signature and reset the status of the request.
- In some forms, E-Signatures may be requested from another user.
  - Currently available for Sponsor submission of Requests.
  - When the request is ready to be approved, click the "Request a Signature" button, select a recipient, and add a message if needed. An e-mail will be sent to the recipient and copied to the requestor.
    - The recipient is instructed to e-sign where indicated, or to contact the original requestor if there are any problems.
  - A named signature line will replace the generic line, with the date of the request. (Reload the page if this does not appear.)
    - Note that this does not restrict who may e-sign; it merely shows who has been requested to e-sign.
  - The signature request may be reset to blank by the original requestor or a Portal administrator. The recipient and requestor will be notified by e-mail of the cancellation.

Help in the Portal

- The "Help" link in the upper right will be updated with the latest edition of this guide.
- Blue buttons with question mark symbols indicate helpful text when completing forms. Click the button to expand the text. The text will not appear in printed versions of the forms.
- For questions related to a particular SGA, e-mail the appropriate TA Contact and/or TA Backup Contact.
- For technical questions, please e-mail eric.reeves@sfcta.org.

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Dashboard View: Alerts, Records assigned to you, and your Subscriptions

- Dashboard is the default page when you sign in. It shows SGAs for which you have been assigned a role – Project Manager, Grants Section Contact, or TA Contact.
- "**Please Review**" Section – Alerts you to Progress Reports that have been SUBMITTED or marked REVISE AND RESUBMIT, for which you are the reviewer. If none, this section does not appear. Entries that are "greyed-out" if you are a backup on the Record.
- "In Review" Section – Alerts you to Progress Reports that have been SUBMITTED or marked REVISE AND RESUBMIT, for which you are the reporter. If none, this section does not appear.
- "**Reports Due**" Section – Shows SGAs for which a Progress Report is due but not submitted. Projects turn red when considered late. If none, this section does not appear. This section is separated by type of Progress Report due (e.g. Quarterly, Annual).
- "**My Projects**" Section – Shows all SGAs for which you have been assigned a role.
- "**My Subscriptions**" Section – Shows all Records to which you have subscribed.
    - You can subscribe to a Record from its Record Detail View page. Records that also appear in "My Projects" are listed in grey. To unsubscribe from a record, click the Unsubscribe button on the Dashboard. If you are assigned to a record, you will continue to receive notifications regardless of subscription status.
- **Search Box** in the upper right – takes you (and your search) to the List View Page.
- If available under your authorization level, the Settings button and Key Counts button may be displayed in the upper right.

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Search Records Page, aka Record List View: Searchable Records

- Search from any other page or click the "Project & Grant Report"" tab on the top menu and choose "Search Records" from the list.
- A search will return all Records within your agency permissions.
- Click an SGA/Project Number to get to the Record Detail View.
  - You can also open an SGA in a new tab by clicking the mouse wheel or using the right-click menu.
- **Search Box** in the upper right – This allows you to search by Fund Source, Project Number, Resolution, Sponsor, Description, Status, Manager, Grant Manager, TA, or TA Backup. You can refine your search by Sponsor or Fund Source by using the drop-down menus. Also, you can toggle between viewing all Records and showing only active Records by clicking the link under the drop-down menus.

Search Tips:

- The **Search Box** is available at the top right of most pages to allow you to search for any SGA.
- Only "Active" SGAs are shown by default. Click the link on the right to switch between "Active" and "All" Records.
- Filter by **sponsor** or **fund source**.
- Find Prop K Expenditure Plan **(EP) numbers** by searching for the three digit fund source followed by a dash, e.g. "102-" (See the last page of these instructions for an explanation of these numbers.)
- You can also search for the **names** of Project Managers or SFCTA Contacts (not Grant Contacts or Backups).
- When searching by **keyword**:
  - Search checks the sponsor names and descriptions taken from the Grant Agreement, as well as sponsor project number (if entered).
  - You can search on partial words. For example, searching for "sign" will return results that have any of the words "sign," "signs," "signal," "signals," "design," or "designs".
- **Sort** by clicking on the title of any column (twice for descending order).
  - Sort by Resolution for **chronological order**.
  - Sort by Number to order by Prop K Expenditure Plan **(EP) number**.

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Record Detail View: Vital statistics of any Project or Grant

- View-only **snapshot** of the SFCTA's database.
  - Grant Information, including resolution and expiration dates; reporting frequency; up-to-date allocated, reimbursed, and remaining balance amounts; and SGA scope.
  - Recently added fields include:
    - Fund Share Approved (Match Percentage): Share of associated scope that is funded by the grant.
    - Funded Phases: The phases that are funded by this grant.
    - Districts: The districts that are involved by the grant/project.
    - Sponsor Project Number: A project number specific to the project sponsor.
    - Total Project Cost Estimate: The total cost of the project including all funding sources
- **Tabs**: See the next page for an explanation of the various tabs below the headline information.
- Current **Contact Information** is on the right-hand side: Project Manager, Grant Section Contact, and SFCTA Contact.
- The "**Edit Project Data**" button if visible, allows you to edit the data displayed on the Record Detail Page.
- The **"New Progress Report"** button in the upper right allows you to submit a Progress Report. After clicking, you will be taken to the Progress Report Edit Form.
- The "**New Annual Report**" button allows you to submit an Annual Report. After clicking, you will be taken to the Annual Report Form.
- The "**New Request**" button allows you to submit a request for close-out, de-obligation, or grant amendment.
- The "**Project Snapshot**" provides a printable report, including
  - Project/Grant Information
  - Staff
  - Text and data from the last Progress Report
  - A graph of Progress Report trends.
  - Special Conditions, Deliverables, and their statuses
  - Comments and files
- The **"Subscribed"** box allows you to subscribe to an SGA and receive notifications. All your Subscriptions will be listed on the Dashboard.

Record Detail View: Types of Date Data in the Portal

Types of Date Data in the Portal	Intended Use	Changes Possible?	Examples
Expiration Date	SFCTA's constraint on sponsor work; set in Grant Agreement	Sponsor requests & SFCTA approves changes through Extension/Amendment process	Prop K Expiration Date
Reminder Date (Deadline Date)	Outside or critical constraints which neither SFCTA nor sponsor can change unilaterally; set in outside agreements	TA Contact chooses which deadlines are appropriate to track; marks complete when deadline is satisfied; updates Portal if changes are approved through appropriate channels	Timely Use of Funds for non-Authority sources; Other critical deadlines Authority and Sponsor must ensure are met
Deliverable "Active as Of" dates	Target dates for items the SFCTA expects to receive from sponsor	TA Contact may edit in Portal and/or mark complete.	SGA Deliverables with target dates
Milestone Dates (Scheduled Completion Date, Open for Use Date, Custom Date Fields)	Sponsor-determined dates to be reported regularly	Sponsor updates with each Progress Report. TA Contact reviews Progress Report and may request additional information.	Scheduled Completion Date, Open for Use Date, Custom Date fields

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Record Detail View: Tabs

The SGA Tabs provide relevant information or files. The numeric badge on each tab signifies the number of viewable items.

Progress Reports	• See draft and submitted Progress Reports. • See draft and submitted Annual Reports. • Click the name to view, or click the links to Edit or Delete (if available).
Comments	• See all comments related to this SGA. • You can add comments to the SGA itself from here but go to the individual Progress Report or Request to add comments for a specific report. • Automated (System-generated) comments appear in color and can be hidden by clicking the button. • When adding a comment, use the e-mail checkbox to send a copy to all assigned staff and subscribers. • **SFCTA users** have the option of leaving a private comment visible only to other SFCTA users. If the e-mail box is also checked, the e-mail will only go to assigned or subscribed SFCTA users.
Files	• See all files uploaded for this SGA, grouped by Report or Request. • You can upload files to the SGA itself from here but go to the individual Progress Report or Request to attach files for a specific report. • **Portal administrators** can pull files from other SGAs into the appropriate SGA. Click the "Move an existing file to this project" button and enter the file name. Use caution as many files have similar names.

Special Conditions & Deliverables	• See the items listed in the SGA with current statuses from the SFCTA database.
	   o Note that "Active" and "Accepted" refer to one-time items, while "Ongoing" and "Completed" refer to continuous or recurring items.
	   o SFCTA Users may select "In Review" if review may take some time.
	   o When the status is "Active" or "Ongoing," the As-of date reflects either the issuance of the grant, or the expected date of submittal.
	• Notify the TA Contact if a status appears incorrect.
	• **SFCTA Users** can change the status by clicking the pencil icon, selecting from the drop-down, and updating the As-of date.
	• **SFCTA Users** can link an item to a file (that has been previously uploaded to the SGA). Click the chain link icon that appears in the upper right and type the name of the file. Repeat to add more files.
	• Only **Portal administrators** can add, delete or edit the text of a Special Condition or Deliverable.
	• This tab is not visible if the record is a Project.

Requests	• See all Close-out, Partial De-obligation, and Grant Amendment Requests for this SGA. • Click the name to view the request and edit (if available).
Reminders	• Reminders are used by the TA Contact for important deadlines. Deadlines associated with outside funding are most likely to use this feature. • E-mail reminders will be sent to all assigned staff and subscribers at 90 days, 60 days, 30 days, and with increasing frequency as the date approaches. • See also the table on the next page related to types of date data in the Portal. • **SFCTA Users** can manage reminders. To create one, add a description of the reminder, enter a due date, and click Create Reminder. The reminder may be marked complete using the check box or edited or deleted using the appropriate links.
Staff	• See current and past staff assignments including the Grant Section Contact, Project Manager, TA Contact, and TA Backup Contact. • Sponsors may notify the Transportation Authority of staff changes by noting the change and effective date in the comments. The TA Contact will receive a notification e-mail and should make the change. • **SFCTA Users** can change the staff assignments using the drop-down menus on the right side of the page. The new staff assignment will show up in Current Assignments and the former staff assignment will move to Past Assignments with an automatically filled end-date of the date the change was made. • **SFCTA Users** may change start and end dates for current or former staff by clicking the pencil icon located to right of the person's name. o Deleting invalid records must be done by a Portal administrator. • Below the assignments, view a list of subscribers to the grant. SFCTA users and Sponsor Grant Managers may add or remove subscribers by selecting a user from the "Add subscription" dropdown menu. Email notifications are sent when staff subscriptions occur. Note that subscribing a user to a record outside a user's sponsor agency will grant them sponsor-level access to the subscribed record.
Cash Flow	• See the SGA cash flow by fiscal year. All fiscal years prior to FY13/14 are combined in "FY2013 and prior". Available information includes Fiscal Year, Cash Flow Amount, Invoiced Amount, Balance, and Released Available Amount. • This information is updated daily directly from Microsoft Dynamics, and currently only includes posted transactions.
Project Location	• Stores information for MyStreetSF mapping • A "1" on the tab will indicate that the record is being mapped.

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Progress Report Edit Form: Creating or Editing a Progress Report

- "**Reporting period**" defaults to most recently ended period (quarter, month, etc).
- "**Percent complete**" between 0 & 100 is required. If available, the previous reported entry is shown.
- "**Scheduled completion date**" is required. Click the "?" button for further instructions.
- **"Open for Use Date"** is required. This is the date when the transportation improvement or new equipment is available for use by the public, even if final completion of the project will follow at a later date. As with the scheduled completion date, Portal users can click on the "?" icon above the *Open for Use Date* field to see a reminder of what information is needed.
- "**Project status**" is required. Click the "?" button for further instructions.
- "**Project activities**" is not required, but may be important for your SGA. Click the "?" button for further instructions.
- **Custom fields** may also appear on the report. These fields should correspondent to recurring Deliverables in your grant agreement. These are not required to be filled in when saving QPR as draft, but will be required prior to submitting the Report. Notify your TA Contact if you have questions about these fields.
- It's a good idea to review the Special Conditions and Deliverables for the SGA to make sure you're including all the required information.
- "**Attach a file**" box allows you to attach a file.
  - Files may also be added after the report is saved or submitted.

Options after creating or editing a Progress Report		
"**Save as Draft**" Button	"**Save and Submit**" Button	"**Back to Project**" Link
• Preserves the Report for future edits or deletion. • Custom Fields not required to be filled in. • Drafts are visible to members of your agency and SFCTA, but no alerts are generated. • Clicking this button takes you to the Progress Report View page, where you may add more files or add a comment.	• Locks the Report and alerts the TA contact. • Custom Fields required to be filled in. • The report will remain visible, and files and comments may still be attached. • Clicking this button takes you to the SGA Detail View Page. The Report will be listed under the "Progress Reports" tab.	• Cancels your edits without saving. • If the report is new, it is not saved at all. • Clicking this link takes you back to the SGA Detail View Page.

Progress Report View: Reviewing an Existing Progress Report

- View what's written in a Progress Report.
- Add and view comments associated with the report.
- Upload and view files associated with the report.
- Perform additional actions based on the report's status.

Progress Report Statuses				
	DRAFT	**SUBMITTED**	**REVISE & RESUBMIT**	**APPROVED**
Sposnor Agency Users	• Anyone in the Sponsor agency may edit or delete the report. • A button on the right allows you to submit the report.	• Sponsor cannot edit or delete the report. • SFCTA will receive a dashboard alert to review and acknowledge the report.	• Report gets this status if SFCTA requires more info. • An e-mail notification will be sent to the PM, Grants contact, and Report submitter if this status is given. • The report can be edited, but not deleted. • Read the e-mail or the comments to find out what's needed.	• The report is locked; Sponsor cannot edit or delete the report. • The report will be included in reports about the SGA. • For most issues, users should leave a comment in lieu of requesting edits to the report.
Note: No matter the status, you can always leave comments or upload additional files to a Report.				

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Grant Requests (Close-outs, De-obligations, and Amendment Requests)

- To create a request, from the SGA Detail Page, click the "New Request" in the upper right and select the request type from the list.

Request Types		
Grant Amendment	**Close-out**	**Partial De-obligation**
• To request changes to a grant's expiration date, project schedule milestone, scope, or cost/funding plan. • If changes also result in a partial de-obligation, note it by checking the appropriate box, but submit the de-ob request separately.	• To request closure of a grant once work is complete. The form includes the option to de-obligate any remaining funds. • Submitting the Close-out form changes the SGA status to Closeout Pending. • Once this form is submitted AND a Progress Report has been submitted indicating 100% Complete, Progress Reporting for the SGA will be turned off.	• To request release of funds from a grant without closing the grant. • Releasing unneeded funds makes more funding available for other, similar projects.

Creating Grant Amendment Requests

- Use checkboxes in each section to note the type of Grant Amendment that is being requested
    - Fund Expiration Date Extension
    - Other Project Schedule Milestone Change
    - Scope Change
    - Cost/Funding Plan Revision
    - Partial De-obligation
    - Other – Explain in Section III
- If applicable, in each section of the form, use checkboxes to note supporting information that will be attached or sent separately.
- Complete the Schedule Amendment Table:
    - Supply an updated open for use date, scheduled completion date, and a desired grant expiration date.
        - For a new expiration date, use the final date of a quarter, and allow sufficient time following the scheduled completion date to complete all billing and reporting.
- Complete the other parts of the form.
    - Enter any **narrative**, including justifications, notes, or comments. Provide sufficient information so that the SFCTA reviewer can confirm the justification of the request.
- Click "**Save as Draft**." You will be able to review the request and add attachments prior to submitting it to the Transportation Authority.

Creating Close-out and Partial De-Obligation Requests

- Complete the Expenditure Report Table:
    - Add any **Amount to be De-obligated** from Prop K/AA/TFCA funds.
    - If the **Billed** column does not match your records, invoices may not have been received yet by the Authority. Add pending amounts to the **Incurred but not in Portal** field so that **Budget after De-obligations** and **Balance** match expected values.
    - Click the "Add Fund Source" link to show funds used from other sources. Enter the Original Budget, Present Budget, Incurred Costs, and Amounts to be De-obligated. You may add as many lines as are necessary. Use the "X" button on the right to delete rows if not needed.
        - Note: The request will be returned for revision if all funding is not shown.
    - **Balance** and **SGA Fund Source Share of Expenses** are calculated automatically. Confirm they match expected values.
- If applicable, in each section of the form, use checkboxes to note supporting information that will be attached or sent separately.

Example Expenditure Report Table: *Enter information shown in italics*							
Fund Source	**Original Budget**	**Present Budget**	**Billed (per Portal)**	**Incurred but not in Portal**	**Amount to be De-obligated**	**Budget after De-obligations**	**Balance**
SGA Fund Source	(From Portal)	(From Portal)	(From Portal)	*Enter information*	*Enter information*	(Calculated)	(Calculated)
Other Fund Source (Enter name)	*Enter information*	*Enter information*		*Enter information*	*Enter information*	(Calculated)	(Calculated)
Add Fund Source Link							
Totals	(Calculated)	(Calculated)	(Calculated)	(Calculated)	(Calculated)	(Calculated)	(Calculated)
SGA Fund Source Share of Total Project Expenses	(Calculated)					(Calculated)	

- Complete the other parts of the form.
    - Enter any **narrative**, including justifications, notes, or comments. Provide sufficient information so that the SFCTA reviewer can confirm the justification of the request.
    - For Close-out forms, complete **DBE utilization** information. If no outside contracts were used, enter zeroes.
- Click "**Save as Draft**." You will be able to review the request and add attachments prior to submitting it to the Transportation Authority.

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Submitting and Checking Grant Requests

- **Review the request and attach supporting information.**
  - If any changes to the form are needed, click "Save" (upper right) or "Update Request" (bottom) to commit the changes.
  - You can copy-and-paste tables from the form by first clicking "Make Readable" below the Expenditure Report table. Then, select the text, copy by right-clicking or using Ctrl-C. Paste into Word, Excel, or another program using the program's paste function or using Ctrl-V. Back in the Portal, if you need to edit the fields, click "Make Editable."
  - Use the file box on the right to attach supporting information. Click "Choose File" or "Browse" (depending on your browser) to find the file. Type in a description and click "Attach a File."
- **Submit the request.** Choose an option below based on your agency's internal procedures.
  1. Option 1: Upload signed copy or signature routing sheet
     - Use the "Print" button (upper right) to print a copy of the form. (Printing currently works best with Internet Explorer, but any browser may be used.)
     - Obtain the appropriate signatures according to your agency's internal procedures.
     - Scan or take a photograph of the signed form (or just the signature page), and save the file.
     - Use the file box on the right to attach the signed form. Click "Choose File" or "Browse" (depending on your browser) to find the file. Type "Signatures" in the description. Click "Attach Signatures and Submit."
  2. Option 2: Sign Electronically
     - E-Signatures allow electronic recording of initials and signatures. **Do not use another user's log-in for this feature.**
     - Click the orange "Sign and Submit" button, enter your password and type your full name (first and last).
     - Once this signature line is submitted, the amendment request is submitted and you can no long make changes to the form.
     - E-signatures should be considered similar to signing paper; you cannot "unsign." In the event of an error, you must contact a Portal administrator to clear a signature and reset the status of the request.
  3. Option 3: Request an Electronic Signature from another User
     - Click the "Request a Signature" button, select a recipient, and add a message if needed. An e-mail will be sent to the recipient and copied to the requestor.
       - The recipient is instructed to e-sign where indicated, or to contact the original requestor if there are any problems.
     - A named signature line will replace the generic line, with the date of the request. (Reload the page if this does not appear.)
       - Note that this does not restrict who may e-sign; it merely shows who has been requested to e-sign.
     - The signature request may be reset to blank by the original requestor or a Portal administrator. The recipient and requestor will be notified by e-mail of the cancellation.
  4. Once submitted, sponsors can no longer make changes to the form.

- **Check the status of the request.**
    - o You will receive an e-mail confirmation that your request has been submitted. The date will also be visible on the request page.
    - o The Authority will review the request and either approve it or ask for revisions. You will receive and e-mail confirmation in either case.
    - o Should revisions be required, repeat the steps above to revise and re-submit the form.
    - o Use the "Open Requests" report from the top menu to check the status of your requests. See "Other Portal Reports" for more information.
- **Documenting approved requests.**
    - o You will receive an e-mail confirmation that your request has been approved.
    - o The request will be locked, with SFCTA Approval language and e-signatures permanently recorded.
    - o If needed, use the "Print" button (upper right) to produce a hard copy or PDF of the form, including e-signature data.

Other Portal Reports

- Under the "Project & Grant Reports", a variety of reports are available.
  - **Search Records:** Shows All SGAs or Active SGAs.
  - **All Records Summary:** Shows detailed information on All Projects and SGAs including Current Allocation, Balance, Last Report, Percentage Complete, Expected Completion, and Status.
  - **Expiring Grants**: Shows SGAs that 1) have reported that completion is expected after grant expiration; 2) are within 30 days of grant expiration, or 3) are past their grant expiration date.
  - **Project Summary:** Shows detailed information on All Projects, including Current Allocation, Balance, Last Report, Percentage Complete, Expected Completion, and Status.
  - **Grant Summary** Report: Shows more detailed information on all SGAs, including Current Allocation, Balance, Last Report, Percentage Complete, Expected Completion, and Status.
- Under the "Open Reports & Requests" tab, a variety of reports are available.
  - **Open Progress Reports**: Shows QPRs that have been submitted (and await review), or have had requests for additional information.
  - **Progress Reports Due**: Shows all SGAs that have progress reports due. This is a universal list of items that appear on the dashboards of individual users.
  - **Open Annual Reports:** Shows annual reports that have been saved as a draft, have been submitted (and await review), or have had requests for additional information.
  - **Open Requests:** Shows Close-out, De-obligation, or Amendment requests that have been created and are not yet approved. Use the filter for "Status" to see approved or canceled requests.
- Reports can be sorted by clicking the column headings. They can be filtered using the boxes on the right.
  - Only "Active" projects are shown by default. Click the toggle button on the right to "All" to show all projects.
- All the reports are **printable** using your browser's print function. If your computer allows it, you can print to **PDF** by selecting the appropriate printer.
- All the reports can be **exported to Excel** or another spreadsheet by clicking the "Download CSV" link.
  - CSV stands for "Comma Separated Values," AKA an unformatted spreadsheet file.
  - To avoid clipping digits from SGA numbers, open the CSV file from inside your spreadsheet program. Mark the SGA Number column as text during the import process.

Profile

- Click "**Profile**" in the top level tabs to see your log in and contact information.
- Click "**Edit**" next to Address to change or update your mailing address.
- Click the "**Edit**" button at the bottom of the Profile to change or update your name, initials, title, department, phone, fax, password or notification settings.
  - Grant managers can opt to receive (or not receive) Portal notifications when progress reports, for projects they are associated with, are **submitted** and/or **approved**. Additionally, there is a checkbox for notifications when **progress reports are due**

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- Once in the Edit mode, type in your new information and click "Update User." Click "Edit login info?" to change your password. Users are permitted to see a history of current and past assignments and subscriptions
    - o Current Assignments: Records in which the user is currently assigned.
    - o Past Assignments: Records in which the user was previously assigned.
    - o Current Subscriptions: Records in which the user is currently subscribed.
    - o Past Subscriptions: Records in which the user was previously subscribed.

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People

- Click "**People**" in the top level tabs to see Portal Users.
- Users can filter for Active, Archived or All People through the "People" dropdown menu.
- Users can search People in "Find People" search box. This search box permits users to search by keyword in First or Last name of Portal Users.
- Users can filter for People by Sponsor, Role, Non-Transportation Authority Staff, Not Signed in Within a Year, or Signed in Within a Year.
- All People's contact information can be **exported to Excel** or another spreadsheet by clicking the "Download CSV" link.
  o CSV stands for "Comma Separated Values," AKA an unformatted spreadsheet file.

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https://portal.sfcta.org

What do SGA numbers mean?

- First three digits are funding source. The 100-series is for Prop K. For example, 102 indicates Prop K Expenditure Plan (EP) number 02 – Third Street Light Rail.
  - Prop K: 100 series by EP number
  - TFCA: 500 Series by Fiscal Year
  - Prop AA: 700 Series by Fiscal Year
  - Lifeline Transportation Program: Begin with LTP
  - One Bay Area Grant Program: Begin with OBA
- Next digit is project phase or type.
  - Prop K: Most projects have "9" for multi-phase.
  - Prop AA: 1 is for Streets projects; 2 for Pedestrian projects; 3 for Transit projects
- Next two digits are for Sponsor. See the Text box.
- Last three digits are sequential by funding source.

> Most Common Sponsors:
> - 02: BART
> - 03: Caltrans
> - 04: TJPA (Transbay)
> - 05: Dept. of City Planning
> - 06: Dept. of Environment
> - 07: SFMTA SSD (DPT)
> - 08: SFDPW
> - 10: SFMTA Muni
> - 11: PCJPB (Caltrain)

Tips & Tricks

- When clicking a link or button, right-click or click the scroll-wheel to open the link in a **new tab**. This makes it easy to switch between pages.

- You can **copy-and-paste** the URL from your browser to any page in the system, if you wish to send someone to a certain page. You can also copy-and-paste lines from any tables in the Portal (as long as the table is in "Readable" mode instead of "Editable" mode—look for a toggle below the table if this is an option). Depending on your e-mail/chat client, the links in the report should transfer too.

- Comments and Files can be added to the SGA (from its tab) **OR** to particular Progress Reports and Project Requests. Make sure you're putting your comment or file in the place you want.

- No matter the status of a particular Progress Report or Request, you can always leave a comment or upload additional files.

- Make use of **.zip files and .mpk files** to quickly upload large batches of files, like sets of photos, GIS shapefiles, or AutoCAD drawings.

- Cutting and pasting text from a word processor produces unpredictable results. Please double check that the text is legible.

- The text fields use a function called "Textile." You can read more about **formatting** using textile here: http://en.wikipedia.org/wiki/Textile_markup_language or try it out here: http://www.textism.com/tools/textile/.
  - Use "h1. " before a title to make it a heading. (h2, h3, etc. also work for sub-heads.)
  - Use "* " before text for bullets, or "# " before text for numbered lists.
  - Use *asterisks around text to bold it*

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